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**FAX TRANSMISSION****DATE:** May 15, 2007**PTO IDENTIFIER:** Application Number 09/892,223-Conf. #1439  
Patent Number**Inventor:** Scott D. Cook**MESSAGE TO:** US Patent and Trademark Office**FAX NUMBER:** (571) 273-8300**FROM:** OSHA · LIANG LLP

Robert P. Lord

**PHONE:** (713) 228-8600**Attorney Dkt. #:** 37202/122001; 990001**PAGES (Including Cover Sheet):** 32**CONTENTS:** Transmittal (1 page)  
Transmittal Letter (2 pages)  
Revocation and Substitute POA under 37 CFR §1.36 with attached Appendix A (27 pages)  
Certificate of Transmission (1 page)

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PTO/SB/21 (04-07)

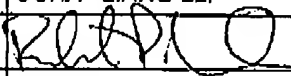
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U.S. Patent and Trademark Office; U.S. DEPARTMENT OF COMMERCE

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<b>TRANSMITTAL FORM</b>  <small>(to be used for all correspondence after initial filing)</small>	Application Number	09/892,223-Conf. #1439	
	Filing Date	June 25, 2001	
	First Named Inventor	Scott D. Cook	
	Art Unit	3691	
	Examiner Name	L. M. Hamilton	
Total Number of Pages in This Submission	31	Attorney Docket Number	37202/122001; 990001

ENCLOSURES (Check all that apply)		
<input type="checkbox"/> Fee Transmittal Form  <input type="checkbox"/> Fee Attached  <input type="checkbox"/> Amendment/Reply  <input type="checkbox"/> After Final  <input type="checkbox"/> Affidavits/declaration(s)  <input type="checkbox"/> Extension of Time Request  <input type="checkbox"/> Express Abandonment Request  <input type="checkbox"/> Information Disclosure Statement  <input type="checkbox"/> Certified Copy of Priority Document(s)  <input type="checkbox"/> Reply to Missing Parts/Incomplete Application  <input type="checkbox"/> Reply to Missing Parts under 37 CFR 1.52 or 1.53	<input type="checkbox"/> Drawing(s)  <input type="checkbox"/> Licensing-related Papers  <input type="checkbox"/> Petition  <input type="checkbox"/> Petition to Convert to a Provisional Application  <input checked="" type="checkbox"/> Power of Attorney, Revocation Change of Correspondence Address  <input type="checkbox"/> Terminal Disclaimer  <input type="checkbox"/> Request for Refund  <input type="checkbox"/> CD, Number of CD(s) _____  <input type="checkbox"/> Landscape Table on CD	<input type="checkbox"/> After Allowance Communication to TC  <input type="checkbox"/> Appeal Communication to Board of Appeals and Interferences  <input type="checkbox"/> Appeal Communication to TC (Appeal Notice, Brief, Reply Brief)  <input type="checkbox"/> Proprietary Information  <input type="checkbox"/> Status Letter  <input checked="" type="checkbox"/> Other Enclosure(s) (please identify below): Transmittal Letter (2 pages) Certificate of Transmission (1 page)
Remarks		

SIGNATURE OF APPLICANT, ATTORNEY, OR AGENT			
Firm Name	OSHA · LIANG LLP		
Signature			
Printed name	Robert P. Lord		
Date	May 15, 2007	Reg. No.	46,479

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MAY 15 2007

Docket No.: 37202/122001; 990001  
(PATENT)

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

In re Patent Application of:  
Scott D. Cook

Confirmation No.: 1439

Application No.: 09/892,223

Art Unit: 3691

Filed: June 25, 2001

Examiner: L. M. Hamilton

For: COLLECTING AND AGGREGATING  
CREDITWORTHINESS DATA

**TRANSMITTAL LETTER**

Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

Dear Sir:

Enclosed are the following items for filing in connection with the above-referenced Patent Application:

1. Transmittal (1 page);
2. Revocation and Substitute POA under 37 CFR §1.36 with attached Appendix A (27 pages); and
3. Certificate of Transmission (1 page).

The Director is hereby authorized to charge any deficiency in the fees filed, asserted to be filed or which should have been filed herewith (or with any paper hereafter filed in

Application No.: 09/892,223

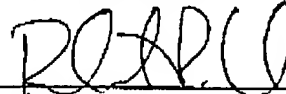
Docket No.: 37202/122001; 990001

this application by this firm) to our Deposit Account No. 50-0591, under Order No. 37202/122001; 990001.

Dated: May 15, 2007

Respectfully submitted,

By



Robert P. Lord

Registration No.: 46,479

OSHA · LIANG LLP

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MAY 15 2007

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

Name of Applicant and/or Assignee: INTUIT INC.  
Address of Applicant and/or Assignee: 2700 Coast Avenue  
Mountain View, California 94043

Commissioner for Patents  
P. O. Box 1450  
Alexandria, VA 22313-1450

**REVOCATION AND SUBSTITUTION  
OF POWER OF ATTORNEY UNDER 37 C.F.R. §1.36**

Dear Sir:

Pursuant to 37 C.F.R. §1.36, Intuit Inc., the applicant and/or assignee of the patent applications listed on the attached APPENDIX A, revokes all previous powers of attorney in the patent applications listed on the attached APPENDIX A, hereby appoints the following attorneys and/or agents assigned to the Customer Number listed below to prosecute the patent applications listed on the attached APPENDIX A, and to transact all business in the U.S. Patent and Trademark Office connected therewith:

Customer Number 57956

Please direct all correspondence and telephone calls concerning the patent applications listed on the attached APPENDIX A to:

Robert P. Lord  
OSHA • LIANG LLP  
1221 McKinney Street, Suite 2800  
Houston, Texas 77010  
Telephone No.: (713) 228-8600  
Facsimile No.: (713) 228-8778

Further, please change the attorney/docket number corresponding to the patent applications listed in APPENDIX A from the attorney/docket number on file to that indicated on APPENDIX A.

The undersigned (whose title is supplied below) is empowered to sign this certificate on behalf of the above-identified applicant.

The undersigned hereby declares that all statements made herein of the undersigned's own knowledge are true, that all statements made on information and belief are believed to be true, and further, that these statements are made with the knowledge that willful false statements, and the like so made, are punishable by fine or imprisonment, or both, under Section 1001, Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the sixteen patent applications listed on the attached APPENDIX A or any patents issuing thereon.

Signature:



Dated:

4/13/07

Name:

Anirma Gupta

Title:

Director, Intellectual Property  
Intuit Inc.

## **APPENDIX A**

- 1. Patent Application/Serial No.:** 60/429,461  
**Title:** EXPORTABLE REPORT TEMPLATES  
**Filed:** 11/26/2002  
**Applicant:** Intuit Inc.  
**Reference No:** 37202/127001; 30010
- 2. Patent Application/Serial No.:** 11/285,917  
**Title:** DISPOSABLE TAX RETURN  
PREPARATION DEVICE  
**Filed:** 11/23/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017281/0101  
**Reference No:** 37202/147001; 30022
- 3. Patent Application/Serial No.:** 10/932,632  
**Title:** EXTERNALLY DEFINED  
APPLICATION CONFIGURATION  
**Filed:** 9/1/2004  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 015765/0311  
**Reference No:** 37202/137001; 30039

4. **Patent Application/Serial No.:** 10/821,774  
**Title:** RECOVERY ACCESS TO SECURE DATA  
**Filed:** 4/8/2004  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 015214/0697  
**Reference No:** 37202/136001; 40098
5. **Patent Application/Serial No.:** 60/630,812  
**Title:** MODEL-DRIVEN TAX APPLICATION FRAMEWORK  
**Filed:** 11/23/2004  
**Applicant:** Intuit Inc.  
**Reference No:** 37202/138001; 40127
6. **Patent Application/Serial No.:** 11/285,930  
**Title:** MODEL-DRIVEN USER INTERVIEW  
**Filed:** 11/23/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017267/0343  
**Reference No:** 37202/138002; 40127

7. **Patent Application/Serial No.:** 11/302,964  
**Title:** USER INTERFACE FOR DISPLAYING  
IMPORTED TAX DATA IN  
ASSOCIATION WITH TAX LINE  
ASSIGNMENTS  
**Filed:** 12/13/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 017652/0143  
**Reference No:** 37202/148001; 40153
8. **Patent Application/Serial No.:** 11/077,047  
**Title:** SEARCH QUALITY DETECTION  
**Filed:** 3/9/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 016387/0477  
**Reference No:** 37202/100001; 40177
9. **Patent Application/Serial No.:** 11/123,475  
**Title:** ESTIMATED TAX REMINDER AND  
PAYMENT FACILITATION SERVICE  
**Filed:** 5/5/2005  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 016542/0549  
**Reference No:** 37202/140001; 50239

10. Patent Application/Serial No.: 11/332,416  
Title: USER INTERFACE FOR LENIENT  
EXCEPTION FEEDBACK  
Filed: 1/13/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 017523/0100  
Reference No: 37202/149001; 50317
11. Patent Application/Serial No.: 11/270,910  
Title: DATABASE SERVER DISCOVERY  
USING A CONFIGURATION FILE  
Filed: 11/10/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017231/0128  
Reference No: 37202/145001; 50328
12. Patent Application/Serial No.: 11/193,906  
Title: INTELLIGENT RECOILATION OF  
DATABASE TRANSFER ERRORS  
Filed: 7/28/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017162/0355  
Reference No: 37202/141001; 50346

13. Patent Application/Serial No.: 11/218,769  
Title: FILTERED LIST ASSISTED ELEMENT SELECTION  
Filed: 9/2/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017171/0536  
Reference No: 37202/142001; 50362
14. Patent Application/Serial No.: 11/471,755  
Title: THIRD-PARTY CUSTOMIZATION OF A CONFIGURATION FILE  
Filed: 6/20/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 018007/0977  
Reference No: 37202/155001; 50392
15. Patent Application/Serial No.: 11/388,641  
Title: ACCOUNTING TRANSACTIONS BY LIST  
Filed: 3/23/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 017729/0058  
Reference No: 37202/153001; 50393

16. Patent Application/Serial No.: 11/374,946  
Title: ANTI-FRAUD CHECK PRINTING  
Filed: 3/13/2006  
Applicant: Intuit Inc.  
Reference No: 37202/150001; 50416
17. Patent Application/Serial No.: 11/424,924  
Title: AUTOMATION OF PAYROLL TAX FILINGS  
Filed: 6/19/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 017806/0707  
Reference No: 37202/154001; 50430
18. Patent Application/Serial No.: 11/386,228  
Title: LINE TRIMMING AND ARROW HEAD PLACEMENT ALGORITHM  
Filed: 3/21/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 017725/0904  
Reference No: 37202/151001; 60494

**19. Patent Application/Serial No.: 11/386,581****Title:** CONTEXTUAL ACCESS TO  
WORKFLOW FUNCTIONALITY**Filed:** 3/21/2006**Applicant:** Intuit Inc.**Reel/Frame No.:** 017723/0365**Reference No:** 37202/152001; 60542**20. Patent Application/Serial No.: 10/392,993****Title:** DATA COLLECTION AND  
TRANSACTION INITIATION USING A  
FINANCIAL MESSAGE PORTOCOL**Filed:** 3/19/2003**Applicant:** Intuit Inc.**Reference No:** 37202/130001; 60790**21. Patent Application/Serial No.: 11/366,164****Title:** DATABASE SERVER DISCOVERY  
USING A CONFIGURATION FILE**Filed:** 3/1/2006**Applicant:** Intuit Inc.**Reel/Frame No.:** 017231/0128**Reference No:** 37202/145002; 60792

**22. Patent Application/Serial No.: 11/366,775**

**Title:** DATABASE SERVER DISCOVERY  
USING A CONFIGURATION FILE

**Filed:** 3/1/2006

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 017231/0128

**Reference No:** 37202/145003; 60793

**23. Patent Application/Serial No.: 60/229,693**

**Title:** AUTOMATED TAX RETURN WITH  
UNIVERSAL DATA IMPORT

**Filed:** 9/1/2000

**Applicant:** Intuit Inc.

**Reference No:** 37202/118001; 60924

**24. Patent Application/Serial No.: 11/278,945**

**Title:** AUTOMATED TAX RETURN WITH  
UNIVERSAL DATA IMPORT

**Filed:** 4/6/2006

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 017455/0636

**Reference No:** 37202/118003; 60925

**25. Patent Application/Serial No.:** 09/892,223

**Title:** COLLECTING AND AGGREGATING  
CREDITWORTHINESS DATA

**Filed:** 6/25/2001

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012215/0868

**Reference No:** 37202/122001; 990001

**26. Patent Application/Serial No.:** 09/957,643

**Title:** VENDOR COMPARISON,  
ADVERTISING AND SWITCHING

**Filed:** 9/20/2001

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012525/0230

**Reference No:** 37202/101001; 990002

**27. Patent Application/Serial No.:** 09/935,205

**Title:** AUTOMATED TAX RETURN WITH  
UNIVERSAL DATA IMPORT

**Filed:** 8/21/2001

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012549/0597

**Reference No:** 37202/118002; 990005

**28. Patent Application/Serial No.: 09/900,485**

**Title:** AUTOMATED, USER SPECIFIC TAX  
ANALYSIS OF INVESTMENT  
TRANSACTIONS USING A  
PERSONAL TAX PROFILE

**Filed:** 7/6/2001

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012548/0111

**Reference No:** 37202/102001; 990006

**29. Patent Application/Serial No.: 09/428,284**

**Title:** MULTIPLE EXCHANGE RATE  
TRACKING IN A FINANCIAL  
TRANSACTION MANAGER

**Filed:** 10/27/1999

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 010978/0371

**Reference No:** 37202/117001; 990008

**30. Patent Application/Serial No.: 09/390,138**

**Patent No.:** 6,446,048

**Title:** WEB-BASED ENTRY OF FINANCIAL  
TRANSACTION INFORMATION AND  
SUBSEQUENT DOWNLOAD OF SUCH  
INFORMATION

**Filed:** 9/3/1999

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 010414/0228

**Reference No:** 37202/114001; 990009

31. Patent Application/Serial No.: 09/395,867  
Patent No.: 6,411,938  
Title: CLIENT-SERVER ONLINE PAYROLL  
PROCESSING  
Filed: 9/14/1999  
Applicant: Intuit Inc.  
Reel/Frame No.: 010379/0248  
Reference No: 37202/115001; 990010
32. Patent Application/Serial No.: 09/541,363  
Title: AUTOMATED ON-LINE PORTFOLIO  
GENERATION  
Filed: 3/31/2000  
Applicant: Intuit Inc.  
Reel/Frame No.: 010718/0356  
Reference No: 37202/103001; 990011
33. Patent Application/Serial No.: 09/534,201  
Title: RECONCILING COMBINATIONS OF  
TRANSACTIONS  
Filed: 3/24/2000  
Applicant: Intuit Inc.  
Reel/Frame No.: 010699/0849  
Reference No: 37202/119001; 990012

**34. Patent Application/Serial No.: 60/260,011****Title:** SOFTWARE MARKETPLACE WITH  
LOW BARRIERS TO ENTRY**Filed:** 1/5/2001**Applicant:** Intuit Inc.**Reference No:** 37202/120001; 990014**35. Patent Application/Serial No.: 09/755,934****Title:** METHOD AND SYSTEM FOR  
REMOTELY MANAGING BUSINESS  
AND EMPLOYEE ADMINISTRATION  
FUNCTIONS**Filed:** 1/4/2001**Applicant:** Intuit Inc.**Reel/Frame No.:** 013590/0090**Reference No:** 37202/107001; 990015**36. Patent Application/Serial No.: 10/029,765****Patent No.:** 7,117,529**Title:** IDENTIFICATION AND  
AUTHENTICATION MANAGEMENT**Filed:** 10/22/2001**Applicant:** Intuit Inc.**Reel/Frame No.:** 017171/0536**Reference No:** 37202/124001; 990016

**37. Patent Application/Serial No.: 07/954,335****Patent No.:** 5,423,033**Title:** REPORT GENERATION SYSTEM AND METHOD**Filed:** 9/30/1992**Applicant:** Intuit Inc.**Reel/Frame No.:** 06360/0855**Reference No:** 37202/110001; 990017**38. Patent Application/Serial No.: 08/275,038****Patent No.:** 5,842,185**Title:** METHOD AND SYSTEM FOR ELECTRONICALLY TRACKING FINANCIAL TRANSACTIONS**Filed:** 7/14/1994**Applicant:** Intuit Inc.**Reel/Frame No.:** 6507/0980**Reference No:** 37202/104002; 990018**39. Patent Application/Serial No.: 08/019,468****Title:** METHOD AND SYSTEM FOR ELECTRONICALLY TRACKING FINANCIAL TRANSACTIONS**Filed:** 2/18/1993**Applicant:** Intuit Inc.**Reel/Frame No.:** 06507/0980**Reference No:** 37202/104001; 990018

40. Patent Application/Serial No.: 08/869,580  
Patent No.: 5,903,881  
Title: PERSONAL ONLINE BANKING WITH  
INTEGRATED ONLINE STATEMENT  
AND CHECKBOOK USER INTERFACE  
Filed: 6/5/1997  
Applicant: Intuit Inc.  
Reel/Frame No.: 8997/0587  
Reference No: 37202/112001; 990019
41. Patent Application/Serial No.: 08/252,670  
Patent No.: 5,649,115  
Title: TRACKING METHOD AND  
APPARATUS  
Filed: 6/2/1994  
Applicant: Intuit Inc.  
Reel/Frame No.: 07038/0311  
Reference No: 37202/111001; 990020
42. Patent Application/Serial No.: 07/424,006  
Patent No.: 5,134,564  
Title: COMPUTER AIDED  
RECONCILIATION METHOD AND  
APPARATUS  
Filed: 10/19/1989  
Applicant: Intuit Inc.  
Reel/Frame No.: 05210/0435  
Reference No: 37202/108001; 990021

**43. Patent Application/Serial No.:** 07/816,892

**Patent No.:** 5,471,575

**Title:** INTERACTIVE PARAMETER DRIVEN  
ITERATIVE FINANCIAL  
SPREADSHEET ANALYSIS WITH  
CONTEXT AND LAYOUT SENSITIVE  
HELP SCREEN

**Filed:** 1/3/1992

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 07863/0739, 05980/0406

**Reference No:** 37202/109001; 990023

**44. Patent Application/Serial No.:** 10/235,896

**Title:** AUTOMATED RETRIEVAL,  
EVALUATION, AND PRESENTATION  
OF CONTEXT-SENSITIVE USER  
SUPPORT

**Filed:** 9/4/2002

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 013575/0951

**Reference No:** 37202/105001; 990031

**45. Patent Application/Serial No.:** 10/099,043

**Title:** CASH GENERATION FROM  
PORTFOLIO DISPOSITION USING  
GENETIC ALGORITHMS

**Filed:** 3/14/2002

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 012709/0890

**Reference No:** 37202/125001; 990032

46. Patent Application/Serial No.: 09/684,547  
Patent No.: 6,745,196  
Title: METHOD AND APPARATUS FOR  
MAPPING A COMMUNITY THROUGH  
USER INTERACTIONS ON A  
COMPUTER NETWORK  
Filed: 10/6/2000  
Applicant: Intuit Inc.  
Reel/Frame No.: 012709/0890  
Reference No: 37202/116002; 990033
47. Patent Application/Serial No.: 60/158,314  
Title: METHOD AND APPARATUS FOR  
MAPPING A COMMUNITY THROUGH  
USER INTERACTIONS ON A  
COMPUTER NETWORK  
Filed: 10/8/1999  
Applicant: Intuit Inc.  
Reference No: 37202/116001; 990033
48. Patent Application/Serial No.: 10/105,602  
Title: WEB-BASED ENTRY OF FINANCIAL  
TRANSACTION INFORMATION AND  
SUBSEQUENT DOWNLOAD OF SUCH  
INFORMATION  
Filed: 3/21/2002  
Applicant: Intuit Inc.  
Reference No: 37202/114002; 990035

49. **Patent Application/Serial No.:** 10/236,332  
**Title:** AUTOMATED GENERATION AND  
DISPLAY OF REPORT RELATED TO  
PROSPECTIVE TRANSACTION  
**Filed:** 9/5/2002  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 013275/0517  
**Reference No:** 37202/113001; 990036
50. **Patent Application/Serial No.:** 10/349,700  
**Patent No.:** 7,124,105  
**Title:** CASH FLOW OPTIMIZATION USING  
A GENETIC ALGORITHM  
**Filed:** 1/22/2003  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 013709/0369  
**Reference No:** 37202/128001; 990037
51. **Patent Application/Serial No.:** 60/608,035  
**Title:** MY TAX HISTORY  
**Filed:** 9/7/2004  
**Applicant:** Intuit Inc.  
**Reference No:** 37202/143001; 990039
52. **Patent Application/Serial No.:** 10/360,319  
**Title:** UNIVERSAL PART NUMBERING  
SYSTEM  
**Filed:** 2/6/2003  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 013815/0409  
**Reference No:** 37202/129001; 990043

- 53. Patent Application/Serial No.:** 10/194,183  
**Title:** INDIVIDUALIZED ANALYSIS AND PROPOSALS FOR FINANCE MANAGEMENT APPLICATIONS  
**Filed:** 7/12/2002  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 013500/0055  
**Reference No:** 37202/126001; 990045
- 54. Patent Application/Serial No.:** 10/722,118  
**Title:** EXPORTABLE REPORT TEMPLATES  
**Filed:** 11/24/2003  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 014684/0803  
**Reference No:** 37202/127002; 990050
- 55. Patent Application/Serial No.:** 60/317,552  
**Title:** CONTEXT-SENSITIVE USER-SUPPORTED DATABASE  
**Filed:** 9/5/2001  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 012427/0164  
**Reference No:** 37202/123001; 990052
- 56. Patent Application/Serial No.:** 10/667,090  
**Title:** LOAN ASSISTANT  
**Filed:** 9/18/2003  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 014322/0635  
**Reference No:** 37202/131001; 990056

**57. Patent Application/Serial No.: 10/753,756**

**Title:** AUTOMATING SETUP OF A USER'S  
FINANCIAL MANAGEMENT  
APPLICATION ACCOUNT FOR  
ELECTRONIC TRANSFER OF DATA  
WITH A FINANCIAL INSTITUTION

**Filed:** 1/7/2004

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 014752/0362

**Reference No:** 37202/133001; 990058

**58. Patent Application/Serial No.: 10/692,702**

**Title:** EDITABLE HYPERTEXT CONTROL

**Filed:** 10/24/2003

**Applicant:** Intuit Inc.

**Reference No:** 37202/132001; 990060

**59. Patent Application/Serial No.: 11/104,049**

**Title:** PORTFOLIO PERFORMANCE  
TRACKING

**Filed:** 4/11/2005

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 016476/0204

**Reference No:** 37202/139001; 990061

**60. Patent Application/Serial No.:** 10/756,736

**Title:** METHOD AND SYSTEM FOR  
BACKFILLING TRANSACTIONS IN  
AN ACCOUNT

**Filed:** 1/12/2004

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 014888/0340

**Reference No:** 37202/134001; 990064

**61. Patent Application/Serial No.:** 60/559,169

**Title:** MISSING DATA COLLECTION

**Filed:** 4/1/2004

**Applicant:** Intuit Inc.

**Reference No:** 37202/135001; 990067-PRV

**62. Patent Application/Serial No.:** 10/982,661

**Title:** AUTOMATED DATA RETRIEVAL

**Filed:** 11/4/2004

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 015877/0657

**Reference No:** 37202/135002; 990067

**63. Patent Application/Serial No.:** 10/916,668

**Title:** BILL PAYMENT OPTIMIZATION  
USING A GENETIC ALGORITHM

**Filed:** 8/11/2004

**Applicant:** Intuit Inc.

**Reel/Frame No.:** 015708/0459

**Reference No:** 37202/128002; 990068

64. Patent Application/Serial No.: 10/856,646  
Patent No.: 6,963,879  
Title: METHOD AND APPARATUS FOR  
MAPPING A COMMUNITY THROUGH  
USER INTERACTIONS ON A  
COMPUTER NETWORK  
Filed: 5/27/2004  
Applicant: Intuit Inc.  
Reel/Frame No.: 016542/0549  
Reference No: 37202/116003; 990073
65. Patent Application/Serial No.: 11/264,368  
Title: STORING ON A CLIENT DEVICE  
DATA PROVIDED BY A USER TO AN  
ONLINE APPLICATION  
Filed: 10/31/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 017484/0244  
Reference No: 37202/144001; 990075
66. Patent Application/Serial No.: 11/036,269  
Title: PROACTIVE TAX PREPARATION  
Filed: 1/13/2005  
Applicant: Intuit Inc.  
Reel/Frame No.: 016193/0311  
Reference No: 37202/135003; 990078

67. Patent Application/Serial No.: 09/805,321

Title: SYSTEM AND METHOD FOR  
TRACKING CHARITABLE  
DEDUCTIONS

Filed: 3/13/2001

Applicant: Intuit Inc.

Reference No: 37202/121001; 990081

68. Patent Application/Serial No.: 11/222,026

Title: PREDICTIVE TAX PREPARATION

Filed: 9/7/2005

Applicant: Intuit Inc.

Reel/Frame No.: 016743/0935

Reference No: 37202/143002; 990083

69. Patent Application/Serial No.: 11/283,560

Title: QUANTITY AVAILABILITY FOR  
INVENTORY ITEMS

Filed: 11/17/2005

Applicant: Intuit Inc.

Reel/Frame No.: 017272/0630

Reference No: 37202/146001; 990086

70. Patent Application/Serial No.: 09/662,233  
Title: DYNAMICALLY RESIZEABLE  
DISPLAY ELEMENTS  
Filed: 9/14/2000  
Applicant: Intuit Inc.  
Reel/Frame No.: 011104/0724  
Reference No: 37202/078001; 990087
71. Patent Application/Serial No.: 09/580,670  
Title: MANAGING MULTIPLE LIFE CYCLE  
PLANS  
Filed: 5/26/2000  
Applicant: Intuit Inc.  
Reel/Frame No.: 011254/0220  
Reference No: 37202/099001; 990088
72. Patent Application/Serial No.: 11/534,532  
Title: FLOW CONTROL INFORMATION  
FOR A MODEL-DRIVEN USER  
INTERVIEW  
Filed: 9/22/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 18344/0198  
Reference No: 37202/138003; 060909

73. **Patent Application/Serial No.:** 11/534,540  
**Title:** PROMPTS FOR A MODEL-DRIVEN  
USER INTERVIEW  
**Filed:** 9/22/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 18344/0198  
**Reference No:** 37202/138004; 060910
74. **Patent Application/Serial No.:** 11/534,544  
**Title:** USER INTERFACE FOR A MODEL-  
DRIVEN USER INTERVIEW  
**Filed:** 9/22/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 18344/0198  
**Reference No:** 37202/138005; 060911
75. **Patent Application/Serial No.:** 11/534,554  
**Title:** USING AN INSTANTIATED MODEL  
TO GENERATE AN APPLICATION-  
SPECIFIC DOCUMENT  
**Filed:** 9/22/2006  
**Applicant:** Intuit Inc.  
**Reel/Frame No.:** 018344/0198  
**Reference No:** 37202/138006; 060912

76. Patent Application/Serial No.: 11/479,197  
Title: PUSH DEBIT/CREDIT PAYMENTS TO BILLERS  
Filed: 6/29/2006  
Applicant: Intuit Inc.  
Reel/Frame No.: 018032/0614  
Reference No: 37202/156001; 60540
77. Patent Application/Serial No.: 60/516,663  
Title: INTERNET ENHANCED SHOPPING SYSTEM  
Filed: 10/31/2003  
Applicant: Intuit Inc.  
Reference No: 37202/075001; 071364
78. Patent Application/Serial No.: 10/651,921  
Title: METHOD OF AND APPARATUS FOR PERFORMING A DATA TRANSFER OPERATION BY MONITORING CONDITIONS DURING THE TRANSFER AND DYNAMICALLY ADJUSTING PARAMETERS CONTROLLING THE TRANSFER  
Filed: 8/29/2003  
Applicant: Intuit Inc.  
Reel/Frame No.: 014838/0303  
Reference No: 37202/095001; 061245

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Application No. (if known): 09/892,223

Attorney Docket No.: 37202/122001; 990001

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Appendix A (27 pages)